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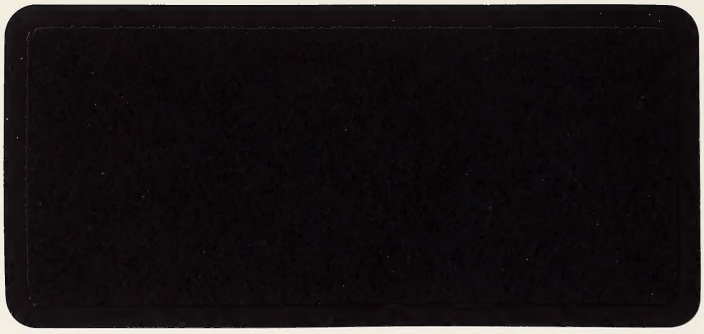
ALBERTA TOURISM
MARKETING DIVISION
MARKETING ACTIVITIES
1990-91



CANADIANA
JUN 27 1990

ALBERTA TOURISM
MARKETING DIVISION
MARKETING ACTIVITIES
1990-91

ALBERTA TOURISM MARKETING ACTIVITIES

Table of Contents

I. Introduction 2

II. Directions and Priorities for Alberta Tourism 3

III. Factors Affecting the Canadian and Alberta Tourism Industry . . . 8

IV. Market Analysis 14

- Regional Markets: Primary 16
- Regional Markets: Growth 21
- North American Markets: Primary 22
- North American Markets: Growth 28
- Vertical (Special Product) Markets: Primary 30
- Pacific Rim Market: Primary 36
- Pacific Rim Markets: Growth 40
- European Markets: Primary 44
- European Markets: Growth 48

V. Marketing Activity Calendar 51

VI. Reference 68

- Glossary of Terms 69
- Organization Chart 70
- Phone List 71
- Bibliography 72

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ALBERTA TOURISM

AND

THE MARKETING DIVISION

MARKETING ACTIVITIES OF ALBERTA TOURISM

I. INTRODUCTION

Tourism in Alberta has been in transition for the past five years and, fortunately, most of the transition has been very positive. We have seen many more vacations taken within our province by Albertans; and we have seen strong responses to Alberta from a number of external markets. However, the tourism industry is continuing to change very rapidly.

The changes affect Alberta's Tourism Department, and they affect Alberta's tourism industry.

More than ever, the industry wants to know the directions being taken by Alberta Tourism - so that industry can plan its marketing activities to best take advantage of Alberta Tourism's programs.

The purposes of this briefing document are as follows:

1. To outline priorities for Alberta Tourism, in the marketing area;

2. To outline the new organization of the Marketing Division and to assist in contacting appropriate offices;

3. To present Alberta Tourism's assessments of its major markets. As the markets shift, industry marketing will need to take these changes into account. We will also see changes in the kinds of tourists and their travel plans in Alberta; and

4. To provide a Calendar of Events - breaking down Tourism's marketing activities in specific markets. We appreciate your feedback on last year's calendar and we hope this detailed breakdown of our plans helps your own planning in these markets.

II. DIRECTIONS AND PRIORITIES FOR ALBERTA TOURISM

1. Global Overview

In the past fifteen years, revenue from the tourism industry in Alberta has increased from $0.4 billion to $2.58 billion.

Tourism is now Alberta's third largest employment and revenue generating industry. It is a key component of Alberta's diversification strategy - and it is an industry which can make large contributions to regional growth.

Alberta Tourism's mission is to lead in the development of a competitive tourism industry, one which will significantly contribute to Alberta's economic growth.

To be more specific, Alberta Tourism has set itself two ambitious goals for the next decade:

(1) To make tourism a key factor in the economic life of Alberta by strengthening the province's standing as a world-class, four-season travel destination; and

(2) To increase tourism revenues in the province from the current level of $2.58 billion to $10 billion by the year 2000.

Alberta Tourism seeks the input and cooperation of Alberta's tourism industry - in developing facilities and infrastructure, and in marketing products to the domestic and international markets. It will take an enthusiastic and determined marriage of efforts between government and the private sector - but if that happens, the benefits for Alberta will be enormous.

2. Changes in Alberta Tourism

Because of the ambitious expectations of tourism's role in the growth and diversification of Alberta, a major shift has taken place in the perception and the reality of the Tourism Department:

Alberta Tourism has shifted from its traditional perception as a promotional agency to becoming an integrated economic development department.

New structures place emphasis on strengthening the industry, strategic planning, coordinated tourism development, and effective policy advocacy. As a result, four new and equal divisions represent the balance of the department's new priorities:

Corporate Development
Industry and Business Development
Planning
Marketing

The purpose of this document is to convey to its readers the ongoing changes which take place in marketing strategies. But readers can also see that other major changes are taking place in order to bring tourism to the forefront of Alberta's economic growth.

3. New Organization in the Marketing Division

a. Objectives

The mandate of the Marketing Division has been defined in the following way: "to lead in the development and implementation of an integrated tourism marketing strategy for Alberta through innovative and strategic positioning of the industry and its products in the global marketplace."

Moving into the 1990's, the Marketing Division of Alberta Tourism has these objectives:

i. To increase awareness of Alberta among high potential visitors;

ii. To attract significantly greater numbers of visitors to the province;

iii. To increase the length of stay and expenditures per visitor and the number of destinations visited, and to increase shoulder and low season travel;

iv. To encourage Albertans to travel more frequently and to more places within the province;

v. To strengthen the tourism industry in Alberta by assisting private industry in promoting Alberta; and

vi. To lever our marketing investment through joint marketing accords.

In carrying out these objectives, the Marketing Division will maintain the essential programs which it has carried out for many years. But given the ambitious objectives set for Alberta Tourism, the Marketing Division is also undertaking new programs - a prime example being the Team Tourism project. This is a joint government/private sector marketing program which began in September of 1988 and will continue through March 31, 1993. Funding for this five-year program comes from Alberta lottery revenues.

b. Structure

To compete with the best in the world, we plan to build our expertise around functional activities - and to assemble a team of marketing experts to deliver in each of these functional areas through a strategic and integrated approach.

The structure has gone through modification as the organization chart on Page 70 shows.

c. Branch Details

There are seven branches in Marketing:

i. Marketing Planning

This branch develops, revises and monitors an integrated marketing strategy. It has these units:

(a) Market Research and Analysis which interprets the market information needed to develop effective long-term programs;

(b) Planning and Program Development which concentrates on giving strategic directions for all marketing activities;

(c) Joint Marketing Accords; and

(d) Team Tourism.

ii. Sales and Promotion

This branch undertakes direct sales activities to consumers and the travel trade. There are three units who sell to Canadian, American and overseas market sectors.

iii Advertising

The advertising group's task is to develop sound but innovative and memorable advertising. There are two units in the branch.

(a) Advertising which handles the regional North American and overseas campaigns, and

(b) Direct Marketing.

iv. Public Relations

This branch works on the non-advertising promotional and support programs and has these units:

(a) Media Relations directed at both consumer and travel industry media;

(b) Publications and Collateral Support which develops the literature, audio visuals, displays and merchandising items for Alberta Tourism; and

(c) Events Marketing which helps maximize destination awareness through involvement in major special events.

v. Meetings/International Liaison Branch

The role of this branch is to provide market intelligence and U.S./international client/lead information to the public and private sector. This branch handles three main functions:

(a) Association Marketing which concentrates on increasing the number of meetings and conventions held in Alberta;

(b) Corporate/Incentive Marketing which is a new initiative designed to increase corporate and incentive travel to Alberta; and

(c) International Liaison which acts as a catalyst between Alberta Tourism's international offices and the government and private sectors.

vi. **Vacation Planning**

This branch works to influence consumer travel patterns to and within Alberta. There are two main units:

(a) Travel Information Centres throughout the province; and

(b) Vacation Counselling - consumers are counselled through toll-free telephones and mail responses.

(c) Bulk distribution of Alberta Touirsm literature plus events information is also coordinated through this section.

vii. **Opportunity Marketing**

This branch is responsible for the coordination and execution of major marketing initiatives such as PATA Marketplace and Project 92.

III. FACTORS AFFECTING THE CANADIAN AND ALBERTA TOURISM INDUSTRY

1. CANADIAN ECONOMY

The Canadian economy is heading toward a very difficult period because of the adverse effects of a persistent tight monetary policy, increased taxes, and changes to the federal sales tax system. The proposed G.S.T. is an important consideration for Canada's economic outlook. Unlike the present tax system, the G.S.T. will, for the first time in Canadian history, tax almost all services. Families earning less than $30,000 will likely be the only group to benefit from the proposed G.S.T. It is estimated that real disposable income of all Canadian households will be lower by $7 billion in 1991 because of the G.S.T.

The resulting decline in domestic travel is expected to commence during the 4th quarter of 1990. Consumers will draw on savings to purchase big ticket consumer durables in anticipation of the price increases on January 1, 1991. As a result, many Canadians are expected to forego discretionary purchases such as leisure travel expenditures.

Implications for tourism in Alberta

1) **Segmentation of markets and integration of marketing efforts will be the focus of successful marketing programs in the 90's, in response to tightened profit margins.**

2) **Continued promotion and development of short, inexpensive vacation opportunities will be more important than in the past, as Canadian consumers are forced to be more cost-conscious than ever before.**

3) **Accommodation establishments and businesses which are involved in retail sales to out-of-country visitors are encouraged to inform visitors that the G.S.T. is refundable and have the necessary forms available.**

2. GLOBALIZATION

The decade of the nineties will be one characterized by the internationalization phenomenon. This trend is being fuelled by advances in telecommunications and it is shown by the emergence of bigger businesses which are expanding across national boundaries through mergers and partnerships. In 1992, the European Economic Community (EEC) will achieve full market integration and have a dramatic effect on the world economic scene.

Globalization will stimulate greater leisure travel and heightened competition; globalization of world business will stimulate more business and meetings/convention travel.

Implications for tourism in Alberta

1) **The Alberta tourism industry may find it difficult to compete on a national level with competition from larger supranational companies.**

2) **Catering to the special needs of business and meetings/convention travellers will become even more important in the 90's.**

3. ENVIRONMENT

A growing awareness exists among Canadians about the importance of maintaining a clean environment and avoiding the environmental crisis which exists in many parts of the world. "Green tourism", which involves the appreciation of natural scenery, will become an important trend Congestion is also an environmental problem and is reaching serious proportions in parts of Europe, Asia and the U.S. This is affecting the willingness of people to travel within these areas.

Implications for tourism in Alberta

1) **Future tourism projects must undertake thorough environmental impact assessments to ensure that the development which occurs is sensitive to the environment.**

2) **Marketing efforts in Alberta's major European markets, in particular, should promote the "clean environment" theme; capitalize on the high environmental awareness of most Europeans.**

3) **In view of congestion problems in Europe, the U.S., and to a lesser extent in central Canada, Alberta's less crowded environment is an advantage.**

4. TRANSPORTATION

The automobile will remain the dominant mode of family travel in North America. The airline industry, however, is most likely to lead the tourism industry toward the globalization trend as they consolidate, privatize and increase economic and technological linkages. Airline capacity and competition are expected to increase in 1990.

With competition from auto travel and from lower air fares, passenger rail traffic in Canada and the U.S. is not growing rapidly. New rail technology is constrained by economic feasibility and the Via Rail cuts have added to the uncertainty in this transportation sector. A few specialized upscale rail services have recently entered the market.

Implications for tourism in Alberta

1) Alberta must continue to negotiate for less restrictive air bilateral agreements and encourage more international airlines to service Alberta, particularly from the U.S. and Pacific Rim countries.

2) Co-op marketing agreements with Alberta Tourism and the airlines will become increasingly important, as the airline industry leads the tourism industry towards the globalization trend.

3) Alberta must work closely with the operators of private rail services to provide the necessary services and attractions required by the increasingly upscale passengers who will be using the private passenger rail service.

5. AUTOMATION

Technology, especially in the form of automation, is invading all areas of the travel industry from ticketing and insurance to the issuance of boarding passes. Technological changes allow for rapid expansion of tourism opportunities and services. Canada's tourism industry is lagging behind the rest of the world in this area.

Implications for tourism in Alberta

The tourism industry must utilize new technology to improve marketing efforts and to better serve the needs of their clients. For example, computerized booking systems insure a smoother planning process and thereby make our destination more accessible and attractive to travel agents, tour operators and meetings planners.

6. ACCOMMODATION

The phenomenon of international hotel chain expansion will continue to dominate the accommodation industry. The pace of consolidation will accelerate due to financial pressures and the increasing importance of markets. The industry will become increasingly sharply defined, as efforts to broaden market appeal through segmentation continue.

Resort facilities will grow in popularity, particularly those compatible with natural surroundings and offering varied recreational opportunities. Budget accommodations will have to meet the growing demands of family travel and seniors travel. All-suite hotels will see rapid growth as they appeal to upscale business and leisure travel demanding more work and entertainment space. Increases in hotel/resort meeting space will become more pronounced as the meeting industry continues to grow. The accommodation industry will increasingly automate to reduce its dependence on a shrinking labor force.

Service, however, will be the key marketing concept in the 90's.

Implications for tourism in Alberta

1) **Alberta should encourage the development of four-season destination resorts which take advantage of the natural surroundings and provide a variety of recreational opportunities.**

2) **Accommodation properties will be forced to more narrowly define their market segments and to tailor their facilities and services to meeting the needs of those particular markets.**

3) **Alberta must balance the need to automate with the demand for high quality service.**

7. SOCIO-DEMOGRAPHIC TRENDS

Crime is a problem of increasing concern particularly in the U.S. and, because of crime and the resulting media attention it receives, security is also becoming an important consideration of visitors in the selection of a vacation destination.

Implications for tourism in Alberta

1) **Since Canada and Alberta presently have a perception of being among the "safest" destinations in the world, Alberta should promote the safety aspect, particularly among the Japanese.**

8. LIFESTYLE TRENDS

There are four significant lifestyle trends:

(1) Increasing Time Pressures on Families: The rise in the number of dual income households is making it difficult for couples to schedule vacation time together and as a result trips are becoming shorter, more frequent and planning time has decreased.

Implications for tourism in Alberta

Travel products which are easy to buy (convenient) and easy to use (hassle-free) will be in greater demand for this group.

(2) Increasingly Complex and Pressure -filled Society: The world is changing rapidly and in response, people are seeking ways to release the increased stress associated with change. There is a trend toward marriage, family and traditional values.

Implications for tourism in Alberta

Greater demand will exist for vacations which offer a "getaway" or "home away from home" experience where people can relax and escape.

(3) High Priorities on Fitness, Personal Development and Individuality: The desire for good health is creating a new way of life for many. Excitement and fantasy are in vogue - and consumers want to make a personal statement through everything they do, including where and how they travel. Adventure travel is the fastest growing segment in the U.S. travel industry.

Implications for tourism in Alberta

Travel marketing must provide experiences which offer activity, challenge and status. There will be a greater demand for new experiences and new destinations which offer high quality.

(4) Aging Population: The age 50+ segment is the fastest growing age segment and they have the time and money and desire to travel. Tomorrow's mature market, however, will have different needs than the traditional mature market.

Implication for tourism in Alberta

The mature market represents an important market niche and travel products must cater to their changing demands for more active, and more educational vacation experiences.

9. MARKET POSITIONING

Competition will be the order of the day for the 1990's.

Implications for tourism in Alberta

(1) It will be increasingly important for Alberta's tourism industry to compete in specific niche markets. Niches include festivals/events, getaway vacations, and high quality outdoor experiences.

(2) Operators must have a well-defined target market and must know their customers well (i.e., what, where, when and how they buy) in order to design effective marketing programs.

(3) The "branding" or "trademarking" of Alberta vacation experiences will provide differential advantage in the cluttered marketplace.

10. HUMAN RESOURCES

The workforce is shrinking and employee expectations are changing. Tourism is currently perceived as an industry with few career opportunities, paying low wages and having generally poor working conditions. Front-line employees deliver either the attentive or indifferent level of service and are thus critical to every firm's marketing efforts.

Implications for tourism in Alberta

(1) Alberta's tourism industry must improve their record and image as a good employer in order to attract a shrinking number of good employees.

(2) Increased professionalism is needed in hiring practices, training methods, and pay/reward systems in order to improve the attractiveness of career opportunities in tourism.

*** A note on an overused phrase: high quality service - high quality service may be defined as the difference between what customers expected and what customers perceive they got. Our challenge then is to continually view service quality from the customers' perspective rather than our own, in order that this phrase retains meaning within our marketing plans.**

MARKET ANALYSIS

MARKET ANALYSIS

Alberta Tourism has divided its target markets into five major segments: regional, North American, Pacific Rim, European and vertical (special product). With each major segment, Alberta Tourism has priorized each state, province or country as being either a primary or growth market.

Regional Markets: Primary
- **Alberta**
- **Saskatchewan**
- **Montana**

Regional Markets: Growth
- **B.C.**

North American Markets: Primary
- **California**
- **Pacific Northwest**
- **Ontario**

North American Markets: Growth
- **Texas**
- **Florida**

Vertical Markets: Primary
- **Washington D.C.**
- **Chicago**
- **New York**
- **Minneapolis**

Pacific Rim Markets: Primary
- **Japan**

Pacific Rim Markets: Growth
- **South Korea**
- **Australia**
- **Hong Kong**

European Markets: Primary
- **United Kingdom**
- **West Germany**

European Markets: Growth
- **France**
- **Netherlands**

IV. MARKET ANALYSIS FOR ALBERTA TOURISM

REGIONAL MARKETS: PRIMARY

ALBERTA

Market Analysis

The economic growth for Alberta is expected to be slow in 1990 and overall the energy industry will dampen Alberta's economic expansion. The average number of in-province leisure trips is expected to decline as Albertans adjust to the economic slowdown.

In 1988, Albertans accounted for about 50% of the provinces' tourism revenues (and over 85% of trips) as they ventured out to visit friends and relatives, shop, sightsee, and participate in a range of sports and outdoor activities. Business travel is the stated reason for almost 20% of all trips.

The main competition for Alberta tourists is British Columbia. Albertans account for close to 20% of B.C.'s out-of-province tourists and Alberta's out-of-province travel is increasing.

There does not appear to be one clear image of Alberta in Albertans' minds. Scenic (mountains/lakes), a variety of terrain, healthy/rugged, friendly, homey, strong, western with camping/hiking, and something for everyone are some common images.

Families and middle income segments are expected to continue doing a great deal of their travelling in the province and Albertans have indicated that they are looking for more activities for their children (especially educational), more out-of-the-way places, and more economical travel.

Marketing Activities 90/91

The Team Tourism program will continue to be Alberta Tourism's primary involvement in the regional marketplace. Team Tourism is a joint industry/government program designed to stimulate private sector marketing, improve the marketing expertise of Alberta tourism-related businesses and organizations and to increase awareness of Alberta's regional tourism destinations provincially, nationally, and internationally.

Alberta's Travel Information Centres and 1-800 counselling services provide a regional presence to encourage Albertans to increase and diversify their travel within Alberta.

Following a longer term focus, Alberta Tourism is involved with committee organizing for the 50th anniversary of the Alaska Highway. As Alberta is the shortest route to Alaska from the U.S., Alberta Tourism seeks to ensure that programs/initiatives will maximize Alberta opportunities.

Market Opportunities 90/91

Team Tourism affords industry operators the opportunity to best capitalize on the events and attractions in their areas of the province through joint marketing efforts with their zone associations.

While the GST is expected to result in an overall decline in domestic travel, it should result in more Albertans travelling closer to home. This will provide an opportunity for industry operators to provide a superior vacation experience which will induce future repeat visits.

In planning marketing activities, the tourism industry in Alberta must carefully choose their particular market segment(s). How well we define "who the customer is" and "what they value" will make a tremendous impact on the success of our future marketing programs. Albertans are following many of the lifestyle trends mentioned in Section I.2

Promotions of specific events and attractions will be important in extending present travel patterns.

SASKATCHEWAN

Market Analysis

Disposable income rose during the first part of 1989 in Saskatchewan, however, recent reports point to another dismal year in the farm sector. This instability affects consumer confidence and population migration. Saskatchewan visits to Alberta should, however, remain stable.

In 1988, Saskatchewan accounted for approximately 20% of Alberta's out-of-province visitors. The majority of Saskatchewan visitors were repeat visitors and came to visit friends and relatives. However, pleasure travel and business travel combined accounted for approximately 50% of the stated reasons for visiting Alberta.

Approximately four-fifths of Saskatchewan visitors to Alberta are from rural or non-metro areas. In a recent survey, "escape" or "get off the farm" was noted as one of the key motivations for travel to Alberta.

Alberta's "Take an Alberta Break" advertising campaign increased awareness of Alberta's attractions and events. Saskatchewan's own attractions and facilities, followed by B.C. and Manitoba, compete with Alberta for tourism revenues. The Calgary Olympics, West Edmonton Mall, skiing, and the national parks/Banff/Jasper advertising themes are those most often recalled by Saskatchewan residents.

Among Saskatchewan visitors, the most frequently visited tourist facilities are lakes/beaches, parks/campgrounds, museums/galleries, and cities. Fairs, festivals, and rodeos are also gaining in popularity.

Saskatchewan residents view Alberta as being fast-paced and cosmopolitan, scenic, with bigger cities than Saskatchewan, and a place where they can go to camp, visit friends and relatives, ski, shop and sightsee.

Marketing Activities 90/91

Tourist Information Centers (T.I.C.'S) are located at the key border crossings of Lloydminster, Walsh and Oyen to encourage Saskatchewan visitors to stay longer and spend more money in Alberta. New and traditional vacation destinations are promoted. Racks are also available in many TIC's for operators to distribute their own brochures along with Alberta Tourism's own excellent literature, brochures and promotional packages.

Market Opportunities

Saskatchewan residents face a tough year ahead particularly in light of the GST and dismal farm economy projections. They will, however, continue to travel to Alberta due to strong ties to friends and relatives and due to the perception that Alberta has superior city and mountain-based products. Alberta's tourism industry can benefit by providing more economical and/or unique products than British Columbia.

Promotions of the Yellowhead highway should encourage travel to Alberta. Emphasis on parks, campgrounds, lakes, fairs, festivals, rodeos and city attractions will continue to encourage Saskatchewan residents to travel in Alberta.

1990/91 represents the first year that Oyen will host a year-round TIC, which can service off-season and shoulder season visitors.

MONTANA

Market Analysis

Montana is close to Alberta and its residents travel outside of their state in numbers similar to Saskatchewan. Alberta's recent advertising campaign claimed to draw 17,000 Montana households to visit. Estimates of total Montana visitors range from 110,000 to 170,000.

Montana itself provides Alberta with competition for tourists. Montana is promoting its centennial in 1990 and will continue to emphasize its two national parks, historic areas, ski areas as well as rodeos and special events. Trips by Montana residents to places other than Alberta were made chiefly to Washington, Oregon, and other states including California, Nevada, Wyoming, Colorado, and Utah.

Montanans show a high propensity to visit parks and campgrounds. Outdoor recreation activities, cities, lakes and beaches, festivals and rodeos are other popular tourism draws visited by Montanans.

Some support exists for the idea that Montana residents view Alberta as a place to engage in outdoor recreation activities. Alberta is viewed by Montanans as scenic and cold with two cities, varied terrain - a Canadian Texas. Key motivations for travelling to Alberta include to participate in "big city" cultural events, to explore/discover, and to escape/try something different. Montanans come to see West Edmonton Mall and other specific attractions. The Calgary Stampede and the Olympics advertising were most easily recalled by Montanans.

Market Activities 90/91

Alberta Tourism provides promotional literature, travel information kits, and pre-trip planning services via a toll-free telephone number to Montana residents. As well, Travel Information Centers are located in St. Mary, Montana, and Milk River and Fort Macleod, Alberta, offering assistance and information to visitors crossing the southern border.

Market Opportunities

Competition will be heavy in Montana in 1990/91 and, therefore, Alberta needs to highlight its unique differences in order to induce travel. Thus, Alberta must promote such elements as the foreign nature of Canada, the superior big city events and attractions, the more majestic mountain and outdoor recreation products, the favorable exchange rates, and the safe, clean environment.

REGIONAL MARKET: GROWTH

BRITISH COLUMBIA

Market Analysis

After experiencing strong economic activity in 1989, British Columbia's economy is forecasted to slow down which will mean lower levels of disposable income and possibly a reduction in the number of British Columbians visiting Alberta.

British Columbia has accounted for roughly 25% of Alberta's out-of-province visitors over the past five years. They came in strong numbers for the 1988 Calgary Olympics but in general split their reasons for coming between visiting friends and relatives, shopping and sightseeing, and pleasure. Business travel is also significant.

Alberta's image is not perceived to be much different or better than what is available in B.C. There is a sense that Alberta is a place to work and B.C. is a place for recreation. This is reinforced by the fact that many Albertans holiday/retire in B.C.

Marketing Activities 90/91

Alberta Tourism provides travel literature and trip planning to B.C. residents via a toll-free telephone number. Travel Information Centers are located in Canmore, Jasper, Crowsnest Pass, and Field, B.C.

Alberta Tourism also participates in Ski World Shows aimed at this market.

Market Opportunities

For many B.C. residents, Edmonton and Calgary are the nearest large cities, making visits for shopping and entertainment popular.

Visitors from northeastern B.C. often find northwestern Alberta an attractive sightseeing and touring adventure. The Brewster bus company will maintain or pick up the former Via Rail routes from B.C. to Alberta.

Alberta must promote unique travel experiences which are not available in B.C., (i.e., Tyrrell Museum, Calgary Stampede, etc.).

NORTH AMERICAN MARKETS: PRIMARY

CALIFORNIA

Market Analysis

California ranks as the sixth economic power of the world and in terms of per capita income is one of the wealthiest states in the nation. California produces the greatest amount of outbound travel and it will probably increase with its significant population increases.

California houses forty-three foreign government tourist offices competing for Californian outbound travel. The state of California and other southwestern states have strong regional campaigns which promote regional travel. Mexico, Hawaii, Western Europe, Great Britain, Australia, Alaska, and Colorado are some of Alberta's major competitors in this market.

Alberta has achieved awareness gains from the 1988 Olympics and our advertising campaigns. However, small changes in awareness significantly impact travel to Alberta. An estimated 168,000 California households travelled to Alberta in 1988.

Californians who travel to Alberta tend to be older working or retired couples without children, better educated than average, wealthier, healthier and more active. Other special interest segments such as downhill skiers, seniors and the associations market exist. Both air and vehicle access are important, with RV travel being a major component of the rubber tire market. A trend exists among Californians towards quick vacation getaways. California travellers decide where, when and how they want to travel and therefore utilize travel agencies and airlines to facilitate their wishes. Californians perceive Alberta as Calgary, the Rockies, beautiful scenery, a cool climate, and foreign.

Marketing Activities 90/91

Alberta Tourism will run a spring advertising campaign in California over the next two years. The "Majesty" campaign is targeted at the 35-67 year old, well educated, upper income individual. In order to "stand out from the crowd", Alberta's brand will be the Rockies. Alberta will be positioned as a rubbertire destination with primary emphasis on the summer season and a subtle emphasis on the province as a shoulder season destination.

Alberta Tourism, along with industry partners, will also run a 1990/91 winter advertising campaign focusing on the ski product and the theme "Hot Rockies". The messages will position Alberta as a warm, inviting ski destination.

The Los Angeles office of Alberta Tourism, open since 1986, provides an Alberta presence in California. A toll free number allows Californians to request travel literature and counselling when planning trips to Alberta.

Alberta Tourism is actively involved with consumer and trade shows as well as promotional activities directed at positioning the province's tourism product in strategic areas of the state.

Market Opportunities

Alberta Tourism's strong activity and a recent heightened exposure from the Calgary Olympics provides an ideal opportunity for operators to gain leverage from their own marketing activities in this highly competitive market. California is a large market but needs to be approached cautiously. For example, although the total population is close to 29 million, a large percentage of residents have reported incomes of less than $25,000. Operators must research and target specific segments. The retired, skiers, meetings and incentive travel, rubbertire, RV and Alaska bound travellers are key segments. Our Los Angeles representatives can provide up-to-date professional advice/expertise to any operator interested in the California and southwestern United States markets.

Fifty percent of the member associations of the Western Conference of Association Executives (which held its spring, 1989 convention in Edmonton) are based in California, and a high percentage of these hold potential for Canada.

Holidays emphasizing scenic touring, natural unspoiled beauty, photographic opportunities, camping and wilderness adventure, cultural activities, and Canadian heritage represent potential for Alberta. Safety and cost effectiveness are appealing messages to the California traveller.

PACIFIC NORTHWEST - WASHINGTON AND OREGON

Market Analysis

The Pacific Northwest's proximity to Alberta and large population base make it an important target market for our tourism industry. Residents from this area see British Columbia and Alaska as major out-of-state destinations. Awareness of Alberta is high.

In a recent survey, the residents of the Pacific Northwest showed an increased awareness of Alberta, Calgary and Edmonton as vacation destinations. This was a result of Alberta Tourism advertising campaigns and the 1988 Olympic Games in Calgary. Washington has a higher awareness of Alberta and shows a higher incidence of travel to Alberta than Oregon.

The primary target group in these markets are older, empty nest couples with higher incomes and more education than average. Rubber tire is the primary mode of transportation. Both markets see Alberta as a place to sightsee, participate in outdoor activities/ski and camp, while Oregon residents also see boating and hunting as things to do in Alberta.

Marketing Activities 90/91

Alberta Tourism's major spring and winter advertising campaigns in California will have a spill over effect in Washington and Oregon.

Alberta Tourism and Travel Montana will undertake a joint advertising campaign this year promoting Alberta/Montana as a single destination. The focus will primarily be on matching our touring product with the rubbertire and recreation-oriented traveller.

Alberta Tourism will also be involved in: trade and consumer events which reach important industry decision makers; media relations which influence major media to print stories on our province; and again, our toll free counselling service along with literature distribution.

Market Opportunities

Alberta Tourism's advertising in both states will heighten awareness of Alberta as a vacation destination. Industry operators can certainly benefit by exploiting this increased exposure.

B.C. and Alaska are popular destinations for both Washington and Oregon residents. Alberta has an opportunity to extend their trips to include Alberta as part of a larger itinerary.

The chief obstacles Alberta must overcome are a perceived sameness of product and competitive clutter. Therefore, Alberta must promote its unique flavor and opportunities which are not available elsewhere.

ONTARIO

Market Analysis

Ontario is projected to undergo a significant economic slowdown in 1990 with performance below the national average. Ontario accounted for approximately 9% of trips made to Alberta from out-of-province origins in 1988. A strong increase from 1986 to 1988 was seen in business trips to Alberta from Ontario. Visiting friends and relatives is the next most popular purpose of travel followed by pleasure. In spite of the 88 Olympics in Calgary, pleasure travel from Ontario appears to have remained constant. There is a relatively high incidence of repeat visitation among Ontarian visitors to Alberta and the primary mode of travel is by air. Ontarians who do come tend to spend more and stay longer than residents of other provinces.

In-province travel is very high in Ontario. Ontarians do most of their out-of-province travel to Quebec, Florida, and other east coast destinations. B.C. and Alberta combined account for approximately .15% of out-of-province Ontarian trips. Having a relatively cool climate, Ontarians most frequently mention "hot spots" as preferred vacation destinations.

While Ontarians are more aware of Alberta than, for example, our principal U.S. markets (e.g., Washington, California, Oregon) Ontarians are less likely to perceive Alberta as a vacation destination. Ontarians see Alberta as Calgary, the Rockies, Banff, Lake Louise and, to some extent, skiing. They appear to have a narrow view of Alberta (i.e., hills/flat lands).

Ontario is the major Canadian market for meetings and conventions marketing, since most Canadian associations are located in Toronto or Ottawa.

Marketing Activities 90/91

Alberta Tourism provides a 1-800 toll free line to this market which provides for literature distribution and pre-trip planning services. (Summer and winter vacation planner booklets are available along with more specific planners focusing on touring, accommodation/campgrounds and adventure products.)

Alberta Tourism will continue to participate in four-season consumer shows (such as the Toronto Ski Show and Toronto Sportsman Show) as well as trade shows, media relations, meetings marketing and corporate co-operative promotions. In the winter of 1990/91, Alberta Tourism and industry partners will launch the new "Hot Rockies" advertising theme to promote our skiing product.

Alberta Tourism will also test market a direct mail advertising program in the coming year which focuses on Alberta's history and the beauty of our unspoiled environment.

Market Opportunities

Though Ontarians have a high overall awareness of our province, they have a relatively low awareness of Alberta as a vacation destination. Distance and correspondingly higher prices are a competitive disadvantage for Alberta.

Thus, this is a key market for targeting specific segments of travellers. Business travellers, skiers, association meeting executives and planners, upscale soft adventure travellers are some important segments for Alberta operators to identify and design marketing approaches around.

NORTH AMERICAN MARKETS: GROWTH

TEXAS

Market Analysis

Since both Texas and Alberta have, as their industrial core, agriculture, oil, and gas, Texans view Alberta as a foreign destination to which they can relate. Business travel between Texas and Alberta is substantial and consequently, air connections between Houston/Dallas and Calgary/Edmonton are very good. An estimated 70,000 Texans came to Alberta in 1985 for business and pleasure purposes.

Texans travelling to Alberta are generally affluent, older, well educated and thus have a high propensity to travel. They enjoy our unspoiled natural beauty, wilderness adventure, friendly people and cultural events and facilities. The ski and outdoor adventure markets have traditionally been strong segments for Alberta. There has been heightened awareness of Canada as a result of the 1988 Olympics and '86 Expo. Alaska and B.C. are also popular destinations.

Canada's favorable exchange rate is another key factor that adds to its appeal as a meetings/convention/incentive destination.

Marketing Activities 90/91

Alberta Tourism is involved in trade and consumer shows promoting Alberta as a vacation destination to this market. As well, Alberta Tourism provides travel planning and literature through an 1-800 number.

Market Opportunities

American Airlines has assumed the Houston/Dallas to Calgary/Edmonton connection bringing the total Canadian cities the airline serves to five. This may represent a future increase in promotions by this airline in the Texas market.

FLORIDA

Market Analysis

Florida is home to a growing number of retired and semi-retired affluent travellers. Alberta is seen as the Rockies, unspoiled natural beauty, the Calgary Stampede, the Olympics, close to B.C. and Alaska, a destination offering sightseeing, wilderness adventure challenge, and safety. R.V. is a significant foreign mode of travel.

Competition is fierce for this market. For the skiing segment, the U.S. West offers more convenient accessibility, lower costs and more intensive consumer advertising. In touring, Europe and Mexico offer respectively, intense variety and inexpensive fun and sun.

Marketing Activities 90/91

Alberta Tourism is involved in trade and consumer shows promoting Alberta as a vacation destination to this market. As well, Alberta Tourism provides travel planning and literature through an 1-800 number.

Market Opportunities

The international skier and the retired couples travelling by R.V. represent the primary potential for this market.

VERTICAL (SPECIAL PRODUCT) MARKETS: PRIMARY

WASHINGTON, D.C.

Market Analysis

Washington D.C. is the location of almost 50% of America's national associations and represents the major external market for meetings and conventions.

The city currently houses 53 convention and visitor bureaus, all actively competing for the conventions/meetings dollars available from the association community. Awareness of Alberta is growing and, again, the province is generally recognized as a new destination with natural beauty, safety, a clean environment and a favourable exchange rate.

Marketing activities 90/91

Alberta Tourism has had a representative in this market for the past three years focusing primarily on the association meetings segment. Alberta Tourism provides travel planning and literature through a 1-800 number, at trade shows, through direct mail campaigns and during sales calls.

Market Opportunities

Alberta's primary potential lies in the meetings and conventions marketing and in spin-off areas. Accessibility as an international destination, friendliness, problem-free destination, modern facilities, and the value of U.S. currency are positive qualities to be emphasized.

Industry can maximize the impact of its marketing efforts by integrating its programs and utilizing the experience and proximity of Alberta Tourism's representative in this market.

CHICAGO

Market Analysis

Chicago has the second greatest concentration of association headquarters in the U.S., as well as many corporate head offices and incentive travel companies. With a population of 7 million, Chicago is the second largest city after New York. Approximately 20,000 Illinois residents visited Alberta in 1985.

Chicago is a difficult market to penetrate. It is highly competitive with a number of overseas destinations and State tourist offices maintaining a strong presence.

Marketing Activities 90/91

Alberta's Meetings/International Liaison Branch has had a presence in Chicago for the past two years. Alberta's Sales and promotions Branch has attended the annual Chicago Metropolitan Ski Council Conference over the past ten years and built awareness of Alberta's ski facilities.

Alberta Tourism provides travel planning and literature through a 1-800 number.

Market Opportunities

Alberta's primary potential lies in the meetings, convention and incentive markets and in the skiing segment.

Industry can maximize the impact of its marketing efforts by integrating its programs and utilizing the experience and proximity of Alberta Tourism's representative in this market.

NEW YORK

Market Analysis

New York has the largest number of purchasers of incentives of any city in the world. New York is also home to many major tour operators. As well, it is a major corporate and media centre and the third largest association market.

Limited direct air access and high air fares (particularly in comparison to Florida, the Caribbean, Mexico and Europe) decrease the appeal of visits to Alberta. Low awareness of Alberta is also a restraining factor.

Travellers from this area seek rest and relaxation, sightseeing (often by bus) in our unspoiled environments, but with quality accommodations. There is also interest in sports and outdoor activities, wilderness adventure and cultural experiences.

Marketing Activities 90/91

Alberta Tourism has had a representative in New York for the past eighteen months, concentrating on the associations/meetings market.

Editorial opportunities arising in the major media have been targeted via the Seattle Media Center, and limited trade marketing activity is carried out through national tour operator associations.

Alberta Tourism provides travel planning and literature through a 1-800 number.

Market Opportunities

Alberta's primary potential lies in the incentive market as well as in reaching important media and tour operator contacts.

Industry can maximize the impact of its marketing efforts by integrating its programs and utilizing the experience and proximity of Alberta Tourism's representative in this market.

MINNEAPOLIS

Market Analysis

Although Canadian destinations are seen to be affordable, Alberta faces heavy competition. Domestic campaigns have been stepped up after the European terrorism scare and the weakening of the U.S. dollar, and, as a result, Minneapolis is saturated with the 'Holiday in America' theme.

Minneapolis has a high concentration of incentive travel companies, and these companies are continually on the lookout for new and different destinations. Positioning Canadian product is difficult because so much similar product is available locally or closer at hand in the U.S. With a climate similar to Canada's, this marketplace seeks sunshine and warm climates in winter, making our winter product difficult to sell.

Marketing Activities

Alberta Tourism's representative in Chicago covers the incentive market and Alberta Tourism attends trade and consumer shows in Minneapolis. Alberta Tourism also works closely with the Tourism Canada office to maintain and increase awareness of Alberta.

Alberta Tourism provides travel planning literature through a 1-800 number.

Market Opportunities

Incentive travel products and skiing are the primary opportunity segments in this market.

OVERSEAS: THE PACIFIC RIM AND EUROPEAN MARKETS - OVERVIEW

The overseas markets are the growth markets of Canada and Alberta in for the 90's. Assuming no growth in U.S. expenditures and 15% increase for other countries, by the year 1992 our overseas travel market will spend as much in Canada as our American friends.

During the first six months of 1989, visits from Japan increased by 26%, Hong Kong by 35%, and the U.K. by 4%. Only West Germany exhibited a decrease in the first six months (2.6%).

Over the next four to five years, Canada can expect to perform well in the overseas market with Japan in particular and the U.K. remaining our most important markets. Our greatest difficulty in gaining additional overseas market share is our lack of direct flights or air capacity to Calgary and Edmonton, and competition from Europe, Australia, the U.S. and Pacific Rim area countries.

Emerging markets for Canada which will show the greatest increase are primarily in the Pacific Rim area and include South Korea and Singapore.

ALBERTA'S TOP TEN OVERSEAS MARKETS (1988)

Country	Number of Visitors (1 or more nights)	Average Length of Stay in Nights	Total Expenditure of All Visitors	% Change 1988/1987
Japan	93,362	4.6	47,257,415	43.3
United Kingdom	86,500	9.9	34,959,172	25.1
West Germany	52,105	10.7	27,474,804	82.5
Australia	30,045	8.2	12,464,290	22.2
Switzerland	13,673	8.3	7,487,274	61.9
The Netherlands	14,888	10.5	6,934,963	14.3
Hong Kong	12,057	7.9	5,155,138	53.0
France	12,033	7.1	4,898,453	27.2
Scandinavia*	8,095	12.7	4,590,263	78.7
New Zealand	10,076	7.7	3,788,442	6.7
Total Overseas	399,493	9.0	199,399,228	39.0

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* Denmark, Norway & Sweden
Source: Non-published, Statistics Canada 66-201

PACIFIC RIM MARKETS: PRIMARY

JAPAN

Market Analysis

Japan has the population, affluence, education, and curiosity about the western world to make it a very lucrative travel market. Add to this the strong value of the yen and the Japanese government's policy to encourage foreign travel (it's goal of 10 million outbound travellers by the early 1990's is already close to being reached) and it becomes impossible to ignore this market.

The Japanese market for long-haul travel is far from saturated. In 1986, 4% of the entire Japanese population travelled out-of-country compared with 34% for West Germany, 16% for France, 12% for the United States. According to our forecast, 20 million Japanese will travel out of country in 1999 and if Canada can maintain its share, this would be an over 100% increase.

In 1988, Japan was Alberta's largest overseas tourist market with 94,000 visitors and 47 million dollars in revenues. They stayed an average 4.6 nights in Alberta. Across Canada, Japanese tourists on a per diem basis outspent visitors from all other origins by 60 to 90 percent.

Not surprisingly, competition is intense for this market. There are over 50 foreign offices in Tokyo vying for a market share. Canada's share increased slightly during the eighties while Australia's share increased dramatically due to a very aggressive marketing campaign.

A 1984 Japanese survey cited Canada as ranking fourth among places Japanese overseas travellers would like to visit, behind Australia, Switzerland, and Japan. Broken down by type of activity, Canada ranked sixth for leisure tours but for sports tours and sea and mountain tours it ranked second and third respectively. Canada ranked very low for shopping and historical tours.

The Japanese perceive Canada to be an uncrowded, safe, clean, action-oriented (skiing) destination with a vast wilderness, beautiful scenery and friendly people. Canada currently has a poor image in terms of city-based activities (shopping, eating out, night life), historical/cultural sites, and its distance from Japan.

Cultural Factors

It is important to recognize Japanese cultural differences. For example, Japanese

eat less at meals, put emphasis on appearance of the meal, worry about tipping, and have stringent preferences for cleanliness and very high quality in products and service. These factors must be studied well in advance of targeting the Japanese market.

Japanese travellers tend to fall into four major groups: single, working people (primarily women) between the ages of 18 and 30; honeymooners; retired couples over 55; and students.

Single, Working People

While Japanese women account for one-third of overseas travel, they account for one-half of Japanese travel to Canada. Travel is seen as a method to upgrade their social status and depth as a maturing lady before becoming immersed in the routines of family and work. The "office ladies" take more holidays than males, have higher disposable incomes, are interested in shopping for brand-name items and participate in sports.

Honeymooner Couples

Over 700,000 marriages take place each year in Japan, and up to 93% of newlyweds travel overseas on a honeymoon. Honeymooners prefer famous destinations and upon return home provide a powerful word-of-mouth effect. They expect world class service.

Retired Couples

"Silver travel" represented 24% of outbound travel in 1986. Most of this market is retired, enjoys a longer, more leisurely pace than the younger generation and demonstrates a higher propensity to make return visits.

Students

While still a rather small group, student travellers constitute the fastest-growing market segment. The majority of trips taken by teenagers are either homestay or "study tours". Numbers are estimated to be as high as 100,000 and take place mostly on the west coast of North America and Europe.

Skiers

A team of Japanese climbers were the first to scale Mount Robson in 1925, making the Rockies a popular press and folk tale story. Canada is the leading overseas destination for the skiers of Japan. Over 5,000 skiers visit Canada annually to avoid the long line-ups and reservation requirements at home.

Marketing Activities 90/91

Alberta Tourism has been present in Japan for eight years. An office and representative in Tokyo provide liaison between Alberta and the Japanese tourism industry.

The annual PATA (Pacific Asia Travel Association) Travel Market, which brings together 1,200 buyers and sellers from 50 countries including Southeast Asia, will occur in Edmonton from April 17-20, 1990. As part of this function, Alberta Tourism will be hosting a special Alberta evening at the Citadel Complex to introduce an image of Alberta that demonstrates the diverse product Alberta has to sell in the international market.

Alberta Tourism, as part of Canada West, prepares and sends a newsletter to Japanese travel agents three times per year. Alberta Tourism is active in trade and consumer shows, trade clubs, and the provision of literature, videos and other support material.

Market Opportunities

1990 represents a very special year and unique opportunity for Alberta and its tourism industry in this most lucrative market.

Hard work is going into organizing the Hitachi Dinoventure project, a major dinosaur exposition which will be held in Tokyo this summer. The dinosaur exhibits are being provided by Alberta's Tyrrell Museum. This event will be staged in an ultra-modern complex which, along with the dinosaur exhibits, will feature a 1200 sq. metre interactive display highlighting Alberta as a vacation destination. Elements of the display will include: a stage for live western and Klondike entertainment; a log cabin information booth; and a hotel terrace for tea and refreshments; plus 3-dimensional models of our nature, cultural, sports and shopping products. This event is expected to attract close to two million Japanese visitors and will receive substantial publicity in Japan through all media.

Air capacity, both domestically and internationally, is a significant constraint to growth. Extension of CAIL service to include the direct flight to Edmonton and Calgary is a significant gain.

Mass media advertising that reaches appropriate saturation levels is extremely expensive in Japan. Therefore, cooperative efforts with the highly organized and centralized Japanese travel industry are essential to the development of outbound travel to Alberta.

High quality products and services, some familiarity with language and customs and a well-organized itinerary will impress the Japanese and keep them coming back.

PACIFIC RIM MARKETS: GROWTH

SOUTH KOREA

Market Analysis

South Korea holds enormous growth potential as a source country for visitors to western Canada. The economy is showing healthy growth and the government is now encouraging outbound travel by lifting the restrictions on money spent and visas given out. As hosts of the 1988 Olympics, Koreans have acquired an interest in the world to match their new freedom to travel. In 1988, outbound departures from Korea increased by 42% and direct arrivals to Canada increased by 35%.

The U.S. and Europe are ranked the number one and two long-distance destinations. Over 60% of trips are made to regional destinations such as Japan. Due to the relative newness of the Korean outbound market, little demographic information is currently available. Much of Canada's current traffic is business travel with a large portion including sightseeing. Koreans, like many of our overseas visitors, are attracted by our beautiful scenery and wide open spaces. The main obstacles to developing this market are the difficulty in obtaining visas to North America (which is being streamlined), the high domestic airfare and language problems and low levels of awareness at the consumer and trade level. Koreans are motivated by interest in how others live, and like to visit historical sites and famous places. Travel is in spring and summer. Alberta is home to 8,000 Koreans.

Marketing Activities 90/91

Alberta Tourism will be involved with the previously mentioned PATA Travel Mart which is attended by South Korean buyers and will host a special Alberta evening. For the first time, Alberta Tourism will participate in Kofitel, a consumer and travel trade show held in South Korea.

Market Opportunities

Middle to high income 40-65 year old couples who have travelled outside Korea before, activity-oriented couples 20-40 with above-average incomes and living in urban centers, educational travellers, business travellers and honeymooners are all segments which afford potential to Canadian suppliers.

A huge increase in trade activity in Korea presents opportunities for Canadian suppliers to make contact and increase awareness. Escorted package tours for groups are expected to serve the majority of Korean visitors. Canada hopes to be included as part of a larger itinerary that begins in the U.S. Direct flights from Seoul to Vancouver (and flights from Nagasaki, Hiroshima, and Fukuoka to Seoul) create an opportunity to attract business and sightseeing tour groups to Alberta.

AUSTRALIA

Market Analysis

Despite a fluctuating economy and a devalued Australian dollar, outbound travel has continued to increase. While Canada's share of this outbound travel market has remained fairly static, western Canada's share of the national total has been steadily increasing. Two out of every three Australians visiting Canada include B.C. or Alberta in their itinerary.

While Canada's primary competition is the United States, Australia itself will be pushing domestic tourism in 1990 with aggressive promotions and the deregulation of the airlines industry. Within Canada, B.C. is a major draw for Australians.

In 1988, 30,000 Australians stayed in Alberta for an average of eight nights and spent $415 per person. Their primary purpose for visiting Canada is split between visiting friends and relatives and pleasure, vacation, and recreation. Canada's primary appeal to Australia is its outstanding scenery and to a less extent its outdoor activities and similar culture. The main perceived drawback is Canada's distance from Australia which makes travel expensive money and time-wise.

The fastest growing segment of the Australian population is the 50+ mature travellers who have the spending power and desire to travel. A survey of Australian wholesalers indicates this group is the best prospects for Canadian vacations.

Marketing Activities 90/91

Alberta Tourism is focusing its efforts in this market through participation in Coroboree, an Australian agent seminar series.

Market Opportunities

Australians have shown a high propensity to travel to Alberta during our off-season. Our proximity to B.C. and the U.S. West Coast provides opportunity to be included as part of a larger North American itinerary

HONG KONG

Market Analysis

Hong Kong has been regarded as one of the world's outstanding examples of free enterprise and it remains an important trading, financial, and manufacturing centre.

The United Kingdom's lease on Hong Kong expires in 1997. Under a special agreement between the U.K. and China, Hong Kong's present social and economic system is to be preserved for 50 years until 2047. However, political uncertainties of post-1997 are already driving many Hong Kong residents from their homeland with a resulting increase in overseas migration and investment to the benefit of Canada's tourism industry.

Canada has been capturing larger shares of the growing Hong Kong travel market. In 1987, Canada's share of the long-haul market (i.e., travellers to destinations outside the Asia Pacific region) was 19%, equivalent to nearly 67,000 persons. However, levels of awareness and interest in Canada as a vacation destination are low.

The target market for long-haul travel out of Hong Kong is aged 25 to 44 years; well-educated and affluent. Sixty-three percent choose all-inclusive vacation packages. Summer is the most popular time to travel. Average trip length to North America is three to three-and-a-half weeks. Planning lead time is 14 weeks. They come primarily to visit friends and relatives and to see the natural beauty of our land. In many cases, the underlying motivation is to experience Canada prior to migration.

Hong Kong travellers are used to urban centers. Canada is perceived as clean, safe, and scenic with good public transportation which are all-important factors to Hong Kong overseas travellers. Canada has a poor image in terms of city-based attractions and tourist spots. As a result, it is not perceived as offering very good value for money, especially considering the time spent i n travelling here. Air capacity and strong competition form the U.S. are other restraining forces to Canada's expectations in this market.

Marketing Activities

Alberta Tourism's primary vehicle to reach this market is P.A.T.A.

Marketing Opportunities

As previously mentioned under Japan, the annual P.A.T.A. (Pacific Asia Travel Association) Travel market will occur in Edmonton from April 17-20, 1990.

EUROPEAN MARKETS: PRIMARY

UNITED KINGDOM

Market Analysis

The United Kingdom accounted for over one-fifth of Alberta's overseas visitors in 1988. This was a 23% increase over 1987. A recent report has suggested that the market potential in the U.K. has increased significantly.

The United States, especially California, Florida, and New York, is Canada's main competitor in this market although Asia and Australia appear to be more preferred destinations. Alberta ranks 4th in awareness and interest among Canadian provinces behind Ontario, B.C., and Quebec.

Canada's leading competitive advantages over other destinations are its outstanding scenery, national parks/forests, wildlife, and safety. Canada's main relative weakness to this market is the cost of air fare.

U.K. visitors to Canada tend to be older (63% are over 55), females, price sensitive, divorced/widowed and are likely to take extended visits (3 weeks plus). In 1988, they spent an average of $40.00/day in Alberta over 9.9 nights. Fifty-two percent of trips are taken in summer and planning lead time is around six months. Only 7% of trips taken to Canada were all-inclusive packages although these are very popular to Europe. Traditionally, a high percentage of trips to Canada from the U.K. are to visit friends and relatives. However, there is a trend towards more trips for pure vacationing purposes.

Aside from generic travel activities, U.K. visitors are most likely to visit friends and relatives and scenic landmarks as well as museums/galleries in Canada. There is also a trend toward special interest/adventure holidays.

Marketing Activities 90/91

The Alberta Tourism representative in London, England provides service to both the consumer and trade sectors by attending major travel events, following up direct enquiries and performing direct sales calls. The representative is an important liaison for industry partners interested in maximizing their impact in the U.K., as well as in France and the Netherlands.

November of 1990 will once again see Alberta Tourism participate in the World Travel Mart in London, a major travel industry show. In January of 1991, Alberta Tourism will again bring important European buyers (including the U.K.) to meet in Alberta with our industry sellers as part of the Canada's West Reverse Marketplace.

To facilitate meetings/convention business, Alberta Tourism develops contacts with U.K-based executives and international associations.

Market Opportunities

In the U.K. (and many other European countries) a trend is occurring away from traditional fun and sun short-haul vacations towards new long-haul destinations. Canada may be positioned as a medium-haul destination. It is 8 hours from the U.K. to Alberta and 22 hours from the U.K. to Australia.

Products which could appeal to segments of the U.K. market include adventure, wildlife tours, bird watching tours, and other special interest itineraries.

WEST GERMANY

Market Analysis

West Germany is a huge travel market, generating over $30 billion (Cdn.) in international travel expenditures. The strong German mark, buoyant economy and long average holiday time contributed to significant increases in long-haul travel from West Germany since 1985. West Germany is Alberta's third most important source of overseas travel receipts in 1988, after Japan and the U.K.

The most popular long-haul destinations among West German travellers are the U.S., Asia, and South Africa followed by Canada, Australia, and the West Indies. Forty percent of West German travellers come to Canada via U.S. cities such as New York and Chicago. A lack of direct air flights from West Germany to Alberta is a key restraining force in tapping the full market potential. Canada's competitive advantages for this market are its outdoor opportunities including outstanding scenery, national parks and forests, and viewing wildlife in a natural setting. Safety, cleanliness and friendly people are secondary strengths. The U.S. is also highly valued for its scenery and parks and is further noted for its shopping/entertainment activities.

The outdoor segment is likely to be 18-34, single, well-educated and has either very low or very high income. The comfort segment would be older, female, retired, married and use package tours.

Travel products in all regions of Canada are readily available to travellers throughout West Germany through a well-developed network of air links. West German tastes are leaning toward more flexible packages, more long-haul travel and more specialized products.

About 57% of long-haul trips involve some sort of package (fly/drive, all-inclusive, guided tour).

Marketing Activities 90/91

Marketing activities in West Germany are coordinated through the office of Alberta's Commissioner General of Trade and Tourism. The Commissioner General is involved with sales trips, attendance at a variety of trade and consumer shows, and coordination of Alberta's presence at ITB.

Alberta Tourism's European Reverse Marketplace (held in Alberta) attracts buyers from this market. The World Travel Mart is also an important show for reaching this market.

Market Opportunities

There has been very poor snow conditions in Europe for the past three years, and international skiers are looking to new destinations. Tourism Canada has put forth an advertising campaign to exploit this opportunity.

Marketers who incorporate the cultural preferences of this market into their marketing programs (such as providing sales brochures written in foreign languages) will achieve the highest level of success.

Alberta's natural beauty and opportunities for outdoor recreation are key products which will appeal to West Germany's strong outdoor segment.

EUROPEAN MARKETS: GROWTH

FRANCE

Market Analysis

Travel to Canada from France has posted enormous gains. Following a decade of stagnation, visits to Canada jumped 31% in 1986 and a further 33% in 1987. Alberta received 12,033 French visitors in 1988, a 27% increase over 1987. This growth is being stimulated by withdrawal of restrictions on purchases of foreign exchange, a favourable exchange rate, cheaper air fares and strong economic growth. The cost of Canadian lodging, motorhome and car rental to French consumers decreased by up to 25% in constant francs between 1982 and 1987 due to the favorable exchange rate.

Fifty-eight foreign countries have tourism offices in France, all competing for the French market. The U.S. is currently the most popular long-haul destination followed by South Africa, Asia, and then Canada. Within Canada, the French are significantly more aware and more interested in Quebec, Ontario, B.C. and Newfoundland/Labrador. Also, a lack of direct air flights from France to Alberta is a key restraining force in tapping the full market potential.

Canada enjoys a very positive image for safety, scenery and cultural ties to France while our perceived weakness, expensive travel, remains. There is an increased demand for winter travel, low cost-inclusive packages and long-haul adventure travel. An extensive travel wholesale and retail system exists in France for suppliers to access including operators specializing in Canadian products. Travel agents are playing a very important role in this market. Associations of employees and retired persons have also become an important channel of distribution.

Marketing Activities 90/91

Tourism Canada and Air Canada, through a joint marketing accord, actively promote Canadian destinations in France. Canada's West is represented in this market through the Marketplace and Atelier Canada. Alberta Tourism's London representative covers this market.

Market Opportunities

There has been very poor snow conditions in Europe for the past three years which has prompted international skiers to look to new destinations. Tourism Canada has put forth an advertising campaign to exploit this opportunity.

France's ski and adventure segments represent good market opportunities for Alberta's tourism industry.

Alberta Tourism's London representative attends some trade and consumer shows in this market.

NETHERLANDS

Market Analysis

The largest sector of Dutch tourism to Canada is from the visiting friends and relatives market; this market represents 46% of the traffic followed by pleasure travellers (19%) and business/conventions (13%). Alberta received 8,000 Dutch visitors in 1988, approximately 8% of the Canadian total.

The average Dutch traveller is very price sensitive and demanding about cleanliness and personal safety. Scenery, uncrowded surroundings, outdoor activities, safe cities and a favourable exchange rate are all attributes the Dutch find attractive about Canada.

Again, there is a trend away from traditional sun and fun destinations towards new long-haul destination experiences.

Marketing Activities 90/91

The Alberta Tourism representative in London makes select sales calls and attends some trade shows in this market. We also work closely with Tourism Canada in The Hague and supply literature for trade and consumer requests.

Alberta Tourism's international association representative develops contacts with Netherlands-based executives of international associations.

Opportunities

The exchange rate factor is making Canada a "now or never" destination for the price conscious Dutch consumer. Canada was in the spotlight in 1988 with the Winter Olympics, a state visit by the Queen of the Netherlands, and a visit to the Netherlands by the RCMP musical ride. Competition has reduced the cost of overseas airline tickets and travel packages so that they are increasingly within the reach of more Dutch consumers

The European airline, KLM, has assumed several Amsterdam to western Canada routes which were formerly serviced by Canadian Airlines. KLM has an extensive route network in Europe and their new interest in western Canada could result in significant incremental traffic.

MARKETING ACTIVITY CALENDAR

1990/91

YEAR ROUND

Mkt. Audience	Branch	Activity Description
All	Marketing Planning	Marketing Activities Booklet
All	Marketing Planning	Planning Model
All	Marketing Planning	Joint Marketing Accords
All	Opportunity Mktg.	Alaska Hwy Rendezvous '92
All	Marketing Planning	Team Tourism
All	Advertising	Production
All	Mtgs/Int'l Liaison	TIC London - literature distr.
All	Public Relations	Posters
All	Public Relations	Photo-Film Library
All	Advertising	Direct Marketing/Fulfillment
All	Advertising	Agency Fees (all branches)
International	Public Relations	Group Press Trips
International	Public Relations	Individual Press Trips
Mtg/Conv Plannrs	Mtgs/Int'l Liaison	Association Executives Mtg - UK
Mtg/Conv Plannrs	Mtgs/Int'l Liaison	CSAE Scholarship
Mtg/Conv Plannrs	Mtgs/Int'l Liaison	ASAE Scholarship
Mtg/Conv Plannrs	Mtgs/Int'l Liaison	Venue Alberta
Mtg/Conv Plannrs	Mtgs/Int'l Liaison	International Promotion
Mtg/Conv Plannrs	Mtgs/Int'l Liaison	U.S. Site Visit
Mtg/Conv Plannrs	Mtgs/Int'l Liaison	GWSAE Scholarship
Mtg/Conv Plannrs	Mtgs/Int'l Liaison	International Site Visit

YEAR ROUND (cont'd)

Mkt. Audience	Branch	Activity Description
Mtg/Conv Plannrs	Mtgs/Int'l Liaison	Client Identification Contract
Mtg/Conv Plannrs	Mtgs/Int'l Liaison	US Association Promotion
North America	Advertising	Association Direct Mrkting (Chicago)
North America	Advertising	Association Direct Mrkting (Wash.)
North America	Marketing Planning	Research
North America	Sales & Promotion	Trade Co-op Program (United States)
North America	Public Relations	Media Centre Operations (U.S.)
North America	Advertising	Association Direct Mrkting (N.Y.)
North America	Sales & Promotion	Destination Visit Prgrm (Fam Tours)
North America	Sales & Promotion	US Tour Op Marketplace (Air Canada)
North America	Public Relations	Individual Press Trips (U.S.)
North America	Public Relations	Group Press Trips (U.S.)
Regional	Public Relations	Department Representatives
Regional	Public Relations	Contract Writing Services
Regional	Vacation Planning	Talking Yellow/Purple Pages
Regional	Vacation Planning	Adtel
Regional	Public Relations	Group Press Trips
Regional	Public Relations	Contract Tour Guide(s)
Regional	Vacation Planning	1990 Travel Counsellor's Manual
Regional	Public Relations	Individual Press Trips

MARCH 1990

Mkt. Audience	Branch	Activity Description
North America	Sales & Promotion	Destination Awareness Fams (Canada)
North America	Sales & Promotion	Toronto Sportsman Show
Regional	TIC Vacation Plan	Radio Reports
Regional	TIC Vacation Plan	TIC winter oper of can, Lloyd, MR
Regional	Sales & Promotion	Ambassador Awards, Edmonton
Regional	Sales & Promotion	Appreciation Night, Calgary

APRIL 1990

Mkt. Audience	Branch	Activity Description
All	Mtgs/Int'l Liaison	Rendezvous Canada
All	Marketing Planning	Industry Liaison
All	Opportunity Mktg.	PATA Travel Mart
International	Mtgs/Int'l Liaison	M & IT Luncheons (United Kingdom)
International	Sales & Promotion	PATA Product Dev. Tours (Pac. Rim)
International	Sales & Promotion	Canada's West Newsletter (Japan)
International	Sales & Promotion	PATA Travel Mart (Pacific Rim)
Mtg/Conv Plannrs	Mtgs/Int'l Liaison	AMMT Europe - Spring Promotion
North America	Sales & Promotion	Destination Area Visits (Canada)
North America	Sales & Promotion	Consumer Sales Promotions (Canada)
North America	Sales & Promotion	NTA Spring Exchange (United States)
North America	Public Relations	Meetings Tabloid
North America	Sales & Promotion	Corporate Co-op Promotions (Ontario)
North America	Advertising	Direct Marketing Campaign (Ontario)
North America	Public Relations	ASAE Trade Show
North America	Advertising	Spring Campaign (1990) (Pacific US)

MAY 1990

Mkt. Audience	Branch	Activity Description
All	Mtgs/Int'l Liaison	Media Fams
All	Mtgs/Int'l Liaison	Trad (prod. dev.) Fams
All	Sales & Promotion	Rendezvous Canada
All	Opportunity Mktg.	Rendezvous Canada
All	Public Relations	Winter Vacation Planner
Mtg/Conv Plannrs	Mtgs/Int'l Liaison	WCAE
Mtg/Conv Plannrs	Mtgs/Int'l Liaison	Showcase Canada - New York
Mtg/Conv Plannrs	Mtgs/Int'l Liaison	E.I.B.T.M.
Mtg/Conv Plannrs	Mtgs/Int'l Liaison	Canada Calling - L.A.
North America	Mtgs/Int'l Liaison	Time of your Life Expo - L.A.
North America	Mtgs/Int'l Liaison	Media Market Place - L.A.

JUNE 1990

Mkt. Audience	Branch	Activity Description
All	Public Relations	Winter Vacation Planner
All	Mtgs/Int'l Liaison	Media Fams
International	Public Relations	Japanese Consumer Brochure
Mtg/Conv Plannrs	Mtgs/Int'l Liaison	Nat'l Assoc. of Exposition Mgrs
Mtg/Conv Plannrs	Mtgs/Int'l Liaison	ASAE Phase II Site Visit
Mtg/Conv Plannrs	Mtgs/Int'l Liaison	SITE University
Mtg/Conv Plannrs	Mtgs/Int'l Liaison	GWSAE Direct-Mail Site Visit
Mtg/Conv Plannrs	Mtgs/Int'l Liaison	IFA
North America	Sales & Promotion	Far West Ski Association-U.S. West
North America	Mtgs/Int'l Liaison	Travel Industry Newsletter - US West
North America	Mtgs/Int'l Liaison	Sales Calls/Travel Trade - US West
North America	Sales & Promotion	U.S.R.S.A. Ski Council (California)
North America	Sales & Promotion	Chicago Metro Ski Council Promo

JULY 1990

Mkt. Audience	Branch	Activity Description
All	Public Relations	Winter Vacation Planner
All	Mtgs/Int'l Liaison	Media Fams
International	Sales & Promotion	Gakken Trade Promotion (Japan)
International	Mtgs/Int'l Liaison	Canada Day Promotion (U.K.)
International	Marketing Planning	Hitachi Dinoventure (Japan)
North America	Mtgs/Int'l Liaison	Sales Calls/Travel Trade - US West
North America	Sales & Promotion	Corporate Co-op Promotions-Ontario
Regional	Sales & Promotion	Equitana, Spruce Meadows

AUGUST 1990

Mkt. Audience	Branch	Activity Description
All	Public Relations	Shells
All	Public Relations	Winter Vacation Planner
International	Sales & Promotion	Canada West Newsletter (Japan)
International	Mtgs/Int'l Liaison	Sales Calls (United Kingdom)
International	Marketing Planning	Hitachi Dinoventure (Japan)
Mtg/Conv Plannrs	Mtgs/Int'l Liaison	Canadian Society of Assoc. Executives
Mtg/Conv Plannrs	Mtgs/Int'l Liaison	ASAE - Summer 1990
North America	Mtgs/Int'l Liaison	Sales Calls/Travel Trade - US West

SEPTEMBER 1990

Mkt. Audience	Branch	Activity Description
All	Public Relations	Summer Vacation Planner
All	Marketing Planning	Industry Liaison
International	Mtgs/Int'l Liaison	Media Fams (United Kingdom)
International	Sales & Promotion	Kofitel (Korea)
International	Sales & Promotion	Sales Mission (Japan)
International	Mtgs/Int'l Liaison	UK Ski Consumer Shows (U.K.)
Mtg/Conv Plannrs	Mtgs/Int'l Liaison	Incentive Trvl. & Mtg. Executives
Mtg/Conv Plannrs	Mtgs/Int'l Liaison	Canada Showcase - Texas
Mtg/Conv Plannrs	Mtgs/Int'l Liaison	Int'l Assoc. of Multi-Management Co's
North America	Public Relations	Adventure Guide
North America	Public Relations	Road Map
North America	Mtgs/Int'l Liaison	Sales Calls - US West
North America	Advertising	Winter/Ski Campaign (Pacific US)
North America	Public Relations	Accommodation/Campground Guide
North America	Public Relations	Touring Guide
North America	Advertising	Winter/Ski Campaign (Ontario)
North America	Sales & Promotion	Delta Ski "Picnics" (United States)
Regional	Public Relations	Accommodation/Campground Guide

OCTOBER 1990

Mkt. Audience	Branch	Activity Description
All	Public Relations	Summer Vacation Planner
International	Mtgs/Int'l Liaison	CAIL Promotions (United Kingdom)
International	Sales & Promotion	Agent Awareness Newsletter (Japan)
International	Mtgs/Int'l Liaison	UK Ski Consumer Shows (U.K.)
Mtg/Conv Plannrs	Mtgs/Int'l Liaison	Canada Calling - Atlanta
Mtg/Conv Plannrs	Mtgs/Int'l Liaison	Quest '91 - Atlanta
Mtg/Conv Plannrs	Mtgs/Int'l Liaison	Canada Calling - Chicago
Mtg/Conv Plannrs	Mtgs/Int'l Liaison	Canada Calling - Washington
North America	Mtgs/Int'l Liaison	Travel Industry Newsletter - US West
North America	Mtgs/Int'l Liaison	Mall Promotions - US West
North America	Mtgs/Int'l Liaison	Sales Calls/Travel Trade - US West
North America	Advertising	Winter/Ski Campaign (Pacific US)
North America	Public Relations	Touring Guide
North America	Public Relations	Adventure Guide
North America	Sales & Promotion	Crescent Ski Council (Atlanta)
North America	Mtgs/Int'l Liaison	Winter Product Shows - South. CA
North America	Public Relations	Road Map
North America	Advertising	Winter/Ski Campaign (Ontario)
North America	Public Relations	Accommodation/Campground Guide
North America	Sales & Promotion	Warren Miller Movie (Canada)

OCTOBER 1990 (cont'd)

Mkt. Audience	Branch	Activity Description
North America	Sales & Promotion	Houston Chronicle Ski Show
North America	Sales & Promotion	Seattle Ski Show
North America	Sales & Promotion	Destination Canada Presnt'n-NTA (US)
North America	Sales & Promotion	Toronto Ski Show
North America	Sales & Promotion	Destination Area Visits (Canada)
North America	Sales & Promotion	Dallas Morning News SkiFest
North America	Sales & Promotion	Corporate Co-op Promotions
North America	Sales & Promotion	NTA Fall Exchange (United States)
Regional	Public Relations	Accommodation/Campground Guide

NOVEMBER 1990

Mkt. Audience	Branch	Activity Description
All	Public Relations	Summer Vacation Planner
International	Mtgs/Int'l Liaison	ABTA Convention (United Kingdom)
International	Sales & Promotion	World Travel Mart (Europe)
Mtg/Conv Plannrs	Mtgs/Int'l Liaison	Int'l Congress & Convention Assoc.
Mtg/Conv Plannrs	Mtgs/Int'l Liaison	Quest '91 - Washington
North America	Mtgs/Int'l Liaison	Sales Calls/Travel Trade - US West
North America	Public Relations	Road Map
North America	Mtgs/Int'l Liaison	Mall Promotions - US West
North America	Public Relations	Adventure Guide
North America	Public Relations	Touring Guide
North America	Mtgs/Int'l Liaison	San Diego Ski Show
North America	Advertising	Winter/Ski Campaign (Pacific US)
North America	Sales & Promotion	Chicago Ski Show
North America	Sales & Promotion	Los Angeles Ski Show
North America	Public Relations	Accommodation/Campground Guide
North America	Sales & Promotion	American Airlines Presentation (US)
North America	Advertising	Winter/Ski Campaign (Ontario)
Regional	Public Relations	Accommodation/Campground Guide

DECEMBER 1990

Mkt. Audience	Branch	Activity Description
All	Public Relations	Summer Vacation Planner
International	Mtgs/Int'l Liaison	Atelier Canada - Paris (France)
International	Mtgs/Int'l Liaison	World Travel Mart (United Kingdom)
International	Sales & Promotion	World Travel Fair (Pacific Rim)
International	Mtgs/Int'l Liaison	Canada's West Advertising (U.K.)
International	Mtgs/Int'l Liaison	Tour - Ams (Benelux)
International	Mtgs/Int'l Liaison	Spate Show (United Kingdom)
Mtg/Conv Plannrs	Mtgs/Int'l Liaison	ChiSAE Holiday Showcase
North America	Public Relations	Road Map
North America	Public Relations	Adventure Guide
North America	Public Relations	Touring Guide
North America	Sales & Promotion	American Bus Association (U.S.)
North America	Mtgs/Int'l Liaison	AB Senior Host Program - US West
North America	Advertising	Winter/Ski Campaign (Pacific US)
North America	Public Relations	Accommodation/Campground Guide
North America	Advertising	Winter/Ski Campaign (Ontario)
North America	Sales & Promotion	Destination Canada Prest'ns-ABA (US)
Regional	Public Relations	Accommodation/Campground Guide

JANUARY 1991

Mkt. Audience	Branch	Activity Description
All	Mtgs/Int'l Liaison	Reverse Marketplace
International	Mtgs/Int'l Liaison	Mason Consumer Show (U.K.)
International	Mtgs/Int'l Liaison	Amsterdam Trade Seminar (Benelux)
International	Mtgs/Int'l Liaison	Canada's West Consumer Show (U.K.)
International	Sales & Promotion	Coroboree (Australia)
International	Sales & Promotion	European Reverse Marketplace
International	Mtgs/Int'l Liaison	Canada's West Advertising (U.K.)
Mtg/Conv Plannrs	Mtgs/Int'l Liaison	Religious Conference Mgmt. Assoc.
Mtg/Conv Plannrs	Mtgs/Int'l Liaison	Professional Conv. Management Assoc.
North America	Mtgs/Int'l Liaison	Asia Travel Festival-San Diego
North America	Mtgs/Int'l Liaison	Metro Phoenix Travel Show
North America	Sales & Promotion	All Canada Show, Chicago
North America	Mtgs/Int'l Liaison	AB Senior Host Program - US West
North America	Advertising	Spring Campaign (1991) (Pacific US)
North America	Advertising	Winter/Ski Campaign (Pacific US)
North America	Mtgs/Int'l Liaison	Mall Shows - US West
North America	Advertising	Winter/Ski Campaign (Ontario)

FEBRUARY 1991

Mkt. Audience	Branch	Activity Description
International	Mtgs/Int'l Liaison	Canada Awards Dinner (U.K.)
International	Mtgs/Int'l Liaison	Canada's West Advertising (U.K.)
International	Mtgs/Int'l Liaison	Confex (United Kingdom)
International	Mtgs/Int'l Liaison	Canada Media Marketplace (U.K.)
International	Mtgs/Int'l Liaison	Scandanavia Trade Shows
International	Mtgs/Int'l Liaison	Air Canada Product Launches (U.K.)
North America	Mtgs/Int'l Liaison	Travel Spectacular - Burbank CA
North America	Mtgs/Int'l Liaison	Auto Club Travel Show-San Diego
North America	Mtgs/Int'l Liaison	Kanaly Invitational - CA
North America	Mtgs/Int'l Liaison	Mall Promotions - US West
North America	Advertising	Winter/Ski Campaign (Pacific US)
North America	Mtgs/Int'l Liaison	AB Senior Host Program - US West
North America	Mtgs/Int'l Liaison	Summer Product Shows - South. CA
North America	Sales & Promotion	Chicago S/S/F/ Product Launch
North America	Sales & Promotion	Portland Sportsman Show
North America	Sales & Promotion	Canada On Wheels, San Francisco
North America	Sales & Promotion	Texas Product Launch
North America	Sales & Promotion	Seattle Sportsman Show
North America	Advertising	Winter/Ski Campaign (Ontario)
North America	Sales & Promotion	American Airlines Presentation (US)
North America	Advertising	Spring Campaign (1991) (Pacific US)

MARCH 1991

Mkt. Audience	Branch	Activity Description
International	Mtgs/Int'l Liaison	Air Can. Scottish Product Launches (U.K)
International	Mtgs/Int'l Liaison	Media Fams (ski) (U.K.)
Mtg/Conv Plannrs	Mtgs/Int'l Liaison	ASAE - Spring 1991
Mtg/Conv Plannrs	Mtgs/Int'l Liaison	Edmonton Ambassador Awards
Mtg/Conv Plannrs	Mtgs/Int'l Liaison	Calgary Appreciation Night
North America	Mtgs/Int'l Liaison	Travel Show/Orange County - US West
North America	Mtgs/Int'l Liaison	Travel Show - Los Angeles
North America	Advertising	Spring Campaign (1991) (Pacific US)
North America	Mtgs/Int'l Liaison	AB Senior Host Program - US West
North America	Mtgs/Int'l Liaison	Int'l Travel Show - San Diego
North America	Sales & Promotion	Northwest Sports Show, Minneapolis
North America	Sales & Promotion	Detroit S/S/F Product Launch
North America	Sales & Promotion	Minneapolis S/S/F Product Launch
North America	Sales & Promotion	Pacific Northwest Prod. Launch
North America	Sales & Promotion	Montana Outdoor Recreation Exp.

REFERENCE

WHAT IS MARKETING?

It is the whole business seen from the point of view of its final result, that is, from the customers' point of view.

"Find wants and fill them"

The central idea of marketing is a matching between a company's capabilities and the wants of the customer in order to achieve the goals of the firm.

GLOSSARY OF MARKETING TERMS

Market: a market is a set of actual and potential buyers of a product.

Product: denotes not only the product itself - its inherent properties and characteristics - but also service, availability, price and other factors which may be important in differentiating the product from those of competitors as the inherent characteristics of the product itself.

Market segment: a group of actual or potential buyers who can be expected to respond in approximately the same way to a given offer; a finer, more detailed breakdown of a market (e.g., by age, income, benefits sought, awareness level, usage rate, etc.).

Mass marketing: one product aimed at all buyers.

Target marketing: one product aimed at one or more market segments.

Positioning: the process of selecting, delineating and matching the segment of the market with which a product will be most compatible.

Planning: the process of pre-determining a course or courses of action based on assumptions about future conditions or trends which can be imagined but not predicted with any certainty.

Marketing mix: the "tools" or means available to an organization to improve the match between benefits sought by customers and those offered by the organization so as to obtain differential advantage. Among these tools are product, price, promotion and distribution service.

Integration: combine parts into a whole; a desirable outcome of the marketing planning process whereby various individual marketing activities are planned together in order to achieve a greater market impact.

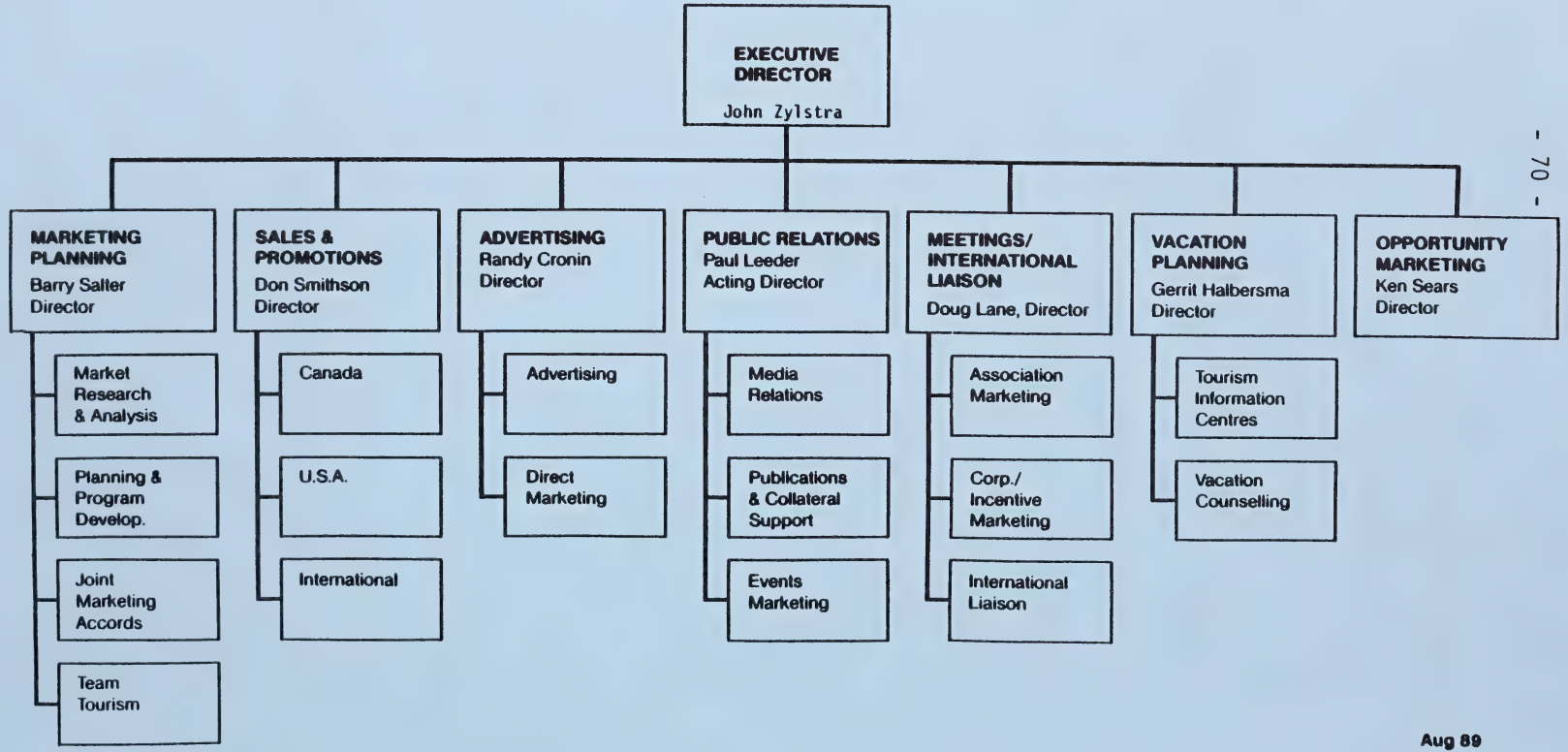
* * * * * * *

When a man does not know what harbour he is seeking, no wind is the right one.

Seneca (A Roman Philosopher)

ALBERTA TOURISM

Organization Chart for Marketing Division



Aug 89

MARKETING DIVISION

Executive Director **John Zylstra**	**422-0483**
Marketing Planning Branch **Barry Salter, Director**	**422-0320**
Sales and Promotion Branch **Don Smithson, Director**	**422-5865**
Meetings/International Liaison Branch **Doug Lane, Director**	**427-1905**
Public Relations Branch **Paul Leeder, Acting Director**	**427-0154**
Advertising **Randy Cronin, Director**	**427-0164**
Vacation Planning Branch **Gerrit Halbersma, Director**	**427-4327**
Opportunity Marketing Branch **Ken Sears, Director**	**427-4327**

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